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THE U.S. COMPUTER INDUSTRY A ONE DAY CONFERENCE

The Waldorf-Astoria
APRIL 7, 1981

AMERICAN INSTITUTE FOR PROFESSIONAL EDUCATION

• JAPAN'S INVASION OF THE U.S. COMPUTER INDUSTRY IS UNDERWAY!

Armed with key technological advances, proven marketing skills, deep and reliable financial resources, intense government encouragement and support . . . and a dedication of purpose shared by industry and labor alike, Japan has quietly but relentlessly launched an all-out assault on America's dominance of the international EDP market.

A recent Japanese research report highlighted the success of Japan's opening forays — and outlined its battle plans for the future. Noting that "Japan has to develop its own technologies by means of the superior brains of its people," this document proudly reminds its readers that:

- Japanese Research and Development expenditures have grown by 16.6% annually over the past five years, while U.S. R & D outlays have increased only by an insignificant 1.2%.
- Japanese receipts from the export of its technology in the past five years have increased by 180%, while U.S. receipts have decreased in the same period.

Year	Memory Capacity Per Chip	Japanese World Market Share
1970	1K	0%
1974	4K	5%
1978	16K	45%
1982	64K	85%?

The extent of Japan's inroads into an industry once considered the exclusive territory of the United States is graphically illustrated in the accompanying table. The table numerically depicts Japan's burgeoning share of the international market for "chips" — the fundamental memory medium for today's computers.

The brunt of Japan's invasion to date has been felt primarily by U.S. semiconductor manufacturers. However, experts predict that the next competitive wave will feature Japanese mainframes, sophisticated software, and the introduction of complete computer systems.

How will the United States computer industry react to this invasion? Will we stand by — complacent, fragmented, and competitively self-destructive while Japan marches to the same tunes of victory that played while it toppled our automobile industry? Will we simply watch from behind the lines while — "on both sides of the Pacific their success is unquestioned, the momentum they have built, unchallenged?" (The New York Times, January 1, 1981)

In order to meet this challenge it is time for the U.S. Computer Industry to face these key questions:

- How can the Federal Government support rather than penalize the industry's efforts to compete internationally?
- Can the industry depend upon software and long term customer relationships to maintain its share of the domestic and international market?
- What cooperative programs between major system manufacturers and specialty OEMs can insure the long term prosperity of both?
- What marketing and pricing strategies at the company level stand the best chance of winning in face of intensive forms of Japanese competition?
- Can the United States judiciary see past its obsession with antitrust towards national goals and how can the industry itself promote such attitudes?

These are complex, difficult questions which many of us would rather not address. The members of this distinguished panel will address these questions openly and vigorously. Each speaker comes to the podium armed with an understanding of and appreciation for the scope and depth of the latest Japanese invasion. In formal presentations and intense question and answer periods we intend to seek out concrete, detailed, and immediate programs which the United States computer industry should mount to beat the unbeatable competitor.

• CONFERENCE TOPICS

Developing a Financial Strategy . . . Surviving with Limited Resources

The Computer Industry and U.S. Government

The Worldwide Computer Market: Today and Tomorrow

Competition on the Technical Front

Marketing Discipline: The Key to the Japanese Threat

U.S. Management: Structuring an Aggressive Response

Commercial Analysis: Product Plans and Market Strategies

Japan vs. America: Two Industries - One Market

• CONFERENCE FORMAT

9:00 - 9:15 a.m. - Introduction and Announcements

9:15 - 11:45 - Morning Speakers

11:45 - 12:15 - Questions and Answers¹

12:15 - 1:15 p.m. - Luncheon

1:15 - 1:45 - Luncheon Speaker

1:45 - 4:00 - Afternoon Speakers

4:00 - 4:45 - Questions and Answers¹

4:45 - 5:00 - Post Conference Remarks

¹It is anticipated that time restrictions may prevent conference speakers from addressing each question from participants. A complete transcript of answers to all questions submitted will be mailed to each conference participant within two weeks of the conference. The distribution of this transcript will be strictly limited to conference participants.

• GUEST SPEAKERS

MIREK J. STEVENSON, Ph.D.

Dr. Stevenson is Chairman of the Board of Quantum Science Corporation, consultant to major U.S., Japanese and European companies.

Quantum Science provides its clients with strategic assessments of the impact of technology on business; with analyses of current and future markets; and with forecasts of key trends in markets, products, and technologies on a multi-disciplinary, multinational basis.

ROBERT HOWARD

Chairman of the Board and Chief Executive Officer, Centronics Data Computer Corporation.

Mr. Howard founded Centronics in 1968, after extensive experience with high-technology companies, including a period as manager of Advanced Development Laboratories for Sylvania. Under Mr. Howard's guidance, Centronics has rapidly grown into a leading manufacturer of electronic printers, competing aggressively and successfully with its Japanese counterparts throughout the United States and Europe.

GLEN R. MADLAND

Chairman, Integrated Circuit Engineering Corporation. Mr. Madland is an internationally recognized expert in the field of micro-electronics. He founded ICE 17 years ago, after serving as Chief of Engineering for the Motorola Company. ICE works directly with electronics companies here and abroad, providing services ranging from the analyses of laboratory reports to recommendations for financial planning. Mr. Madland holds eight patents in the field of micro-electronics, and is the author of numerous technical papers and articles.

THE HONORABLE JAMES M. SHANNON

Congressman, 5th District, Massachusetts.

Representative Shannon is a member of the House Ways and Means Committee, and a member of its Subcommittee on Trade. As Congressman from a region of the United States noted for its concentration of high-technology industries, Representative Shannon has focused his committee work and legislative efforts on issues involving the U.S. role in international trade. He has worked specifically towards the elimination of legislative impediments facing U.S. companies, and towards defining the role of Federal Government in the support of American exporting, today and tomorrow.

C. OAKLEY MERTZ

Vice President for Vendor Services, The Gartner Group. Formally in charge of research services for International Data Corp. (IDC), Mr. Mertz develops comprehensive studies of the information needs of principal industrial and science sectors of the international market place. His clients include leading data processing companies, component manufacturers, large corporate users of information systems — and members of the international investment community.

EDWARD LESNICK

Assistant to the President, Wang Laboratories.

Mr. Lesnick has responsibility for the development and implementation of the technological innovations of this major U.S. computer company. In addition, he oversees Wang's investigations of new product ideas and new markets. Mr. Lesnick has testified extensively before various committees of Congress; his testimony has included comments on the role of government in the promotion of Research and Development efforts of U.S. computer companies, and on legislation that will encourage U.S. export activity.

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The Waldorf-Astoria, New York City — April 7, 1981

The American Institute for Professional Education, 100 Kings Road, Madison, New Jersey 07940

REGISTRATION INFORMATION

Conference Fees

The \$295. registration fee includes the conference, coffee breaks and luncheon.

Registration

To register, mail the registration form or phone 201-377-7400.

Cancellations

The registration fee is fully refundable up to five business days prior to the starting date of the conference. A charge of 50% to cover incurred expenses will be assessed for any cancellation after that date. Substitutions may be made at any time at no charge.

Hotel Accommodations

Contact the Waldorf directly to reserve a room. A

block of rooms will be held at the hotel until two weeks prior to the conference. Please identify yourself with the conference and the American Institute when making your reservation.

About the Institute

The American Institute for Professional Education was founded in 1972. It is a non-profit organization serving the educational needs of business professionals. The American Institute strives to provide for the interdisciplinary needs of professionals in today's rapidly expanding technological fields through specialized conferences as well as two and three day seminars/workshops offered throughout the United States, Canada and Australia. For the current listing of sessions available, call the registrar at (201) 377-7400.

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TYPE OF REGISTRATION

- Single \$295
- Multiple

METHOD OF PAYMENT

- Check Enclosed
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April 7, 1981

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